

EXHIBIT A



Chester County Intermediate Unit

Invoice

Educational Service Center

455 Boot Road

Downingtown, PA 19335

Due Date: 7/30/2018

Pennsbury School District
Attn: Business Manager
134 Yardley Ave
Fallsington, PA 19054-1119

Comments - Attn: Bill Gretzula

Terms: Net 30
Invoice Date: 6/30/2018
Invoice #: 404776
Page: 1
Customer #: 586
Phone :

Qty	Description	Unit Price	Extended Amount	Balance Due
1.00	Payment due for Executive Coaching Services provided by Dr. Joseph O'Brien	\$8,000.00	\$8,000.00	\$8,000.00

Make checks payable to "CCIU". Please write the invoice number on your check, and include one copy of this invoice with your payment.

Invoice Total \$8,000.00

Balance Due \$8,000.00

Thank you for using Chester County Intermediate Unit services.

Please Note - A fee of \$25 will be assessed for any returned checks.

If you have questions regarding your account, contact Paula Brown at 484-237-5073 or paulab@cciu.org

Printed: 7/5/2018, 1:49:31 PM

Pennsbury School District			
Expenses for Executive Coaching Services			
BILLABLE HOURS:	# of Hours	Hourly Rate	Total
Dr. Joseph O'Brien	80.75	\$125.00	\$10,093.75
Clerical Support	10.00	\$35.00	\$350.00
		Subtotal	\$10,443.75
TRAVEL/OTHER EXPENSES:	# of Miles	Mileage Rate	Total
Dr. Joseph O'Brien	897.00	\$0.545	\$488.87
		Subtotal	\$488.87
TOTAL BILL & EXPENSES			
Total Actual Costs for Services	\$10,932.62		
Contract Cap	\$8,000.00		
Difference (actual & capped cost)	-\$2,932.62		
Total Adjusted Amount Due	\$8,000.00		

Date	Reason	Time
1/29/18	Mtg. w/Brill Gretzula	3.50
1/29/18	Phone Conf. w/Christian Swartz	1.50
1/29/18	Phone Conf. w/Christine Toy-Dragoni	0.75
1/30/18	Phone Conf. w/Gary Sanderson	1.00
2/1/18	Phone Conf. w/Deb Wachspress	1.50
2/1/18	Phone Conf. w/Jacqueline Redner	1.50
2/2/18	Phone Conf. w/John Palmer	1.00
2/6/18	Phone Conf. w/Nancy Lawson	0.50
2/6/18	Phone Conf. w/Joshua Waldorf	1.25
2/9/18	Phone Conf. w/T.R. Kannon	0.50
2/20/18	Phone Conf. w/Bill Gretzula	1.00
2/26/18	Face-to-Face Interview w/Michele Spack	0.75
2/26/18	Face-to-Face Interview w/Donna Dunar	0.75
2/26/18	Face-to-Face Interview w/Kevin Dorsey	0.75
2/26/18	Face-to-Face Interview w/Ann Langtry	0.75
2/26/18	Face-to-Face Interview w/Dan Rodgers	0.50
2/26/18	Face-to-Face Interview w/Betty Ann Rarrick	0.75
2/26/18	Face-to-Face Interview w/Beth Aldridge	0.75
2/26/18	Face-to-Face Interview w/Joanne Godzieba	0.75
2/26/18	Face-to-Face Interview w/Bill Gretzula	1.25
2/26/18	Face-to-Face Interview w/Charlie Williams	0.75
2/28/18	Face-to-Face Interview w/Reggie Meadows	1.00
2/28/18	Face-to-Face Interview w/Donna McCormick-Miller	0.75
2/28/18	Face-to-Face Interview w/Stephanie Hultquist	0.75
2/28/18	Face-to-Face Interview w/Laura Tittle	0.75
2/28/18	Face-to-Face Interview w/Joanne Godzieba	0.75
2/28/18	Face-to-Face Interview w/Peggy Schiavone	1.00
3/1/18	Mtg. w/Pennsbury Board	4.00
3/8/18	Phone Conf. w/Christian Swartz	0.75
3/15/18	Mtg w/Pennsbury Board	3.75
3/19/18	Face-to-Face Interview w/Kevin Dorsey	0.75
3/19/18	Face-to-Face Interview w/Sherri Morett	0.75
3/19/18	Face-to-Face Interview w/Dan Rodgers	0.25
3/19/18	Face-to-Face Interview w/Lisa Becker	0.75
3/19/18	Face-to-Face Interview w/Joe Masgai	0.75
3/19/18	Face-to-Face Interview w/Teri Ricci	0.75
3/29/18	Mtg. w/Brill Gretzula	4.50
3/29/18	Mtg. w/Dorothea Brown	1.50
4/10/18	Mtg w/Pennsbury Board	3.50
4/24/18	Mtg. w/Cabinet Members	5.00
5/21/18	Phone Conf. w/Peter Amuso	0.25
5/25/18	Phone Conf. w/Bill Gretzula	0.50
6/6/18	Wrap-up Email	1.00
Various Dates	Miscellaneous Phone calls with variety of stakeholders	13.00
Various Dates	Analysis of Interviews	3.50
Various Dates	Writing of Executive Coaching Report	5.25
Various Dates	Writing of Allegations & Follow-up Report	3.50
	Total Billable Hours	80.75

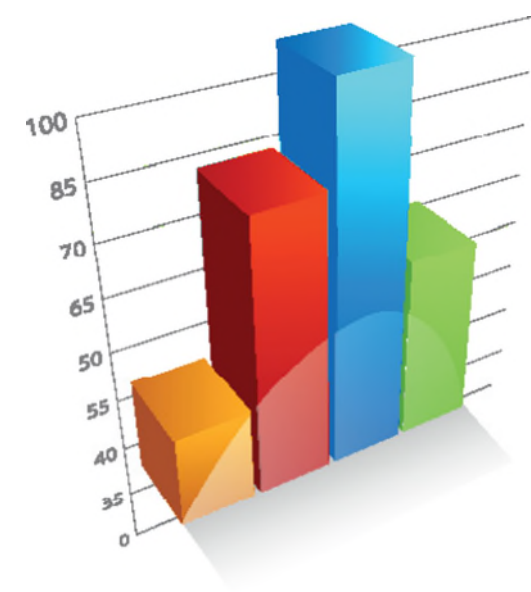
Pennsylvania
Facts and Figures

Institutions

- Public School Districts - 500
- Intermediate Units - 29
- CTCs - 94
- Public Schools (PK-12) - 3,303
- Charter Schools (Including Cyber) - 154
- Private/Non-Public Schools - 2,428

Enrollment

- Public Schools (PK-12) - 1,770,065
- Charter Schools - 132,770
- Home School - 24,076
- Private/Non-Public (K-12) - 231,269



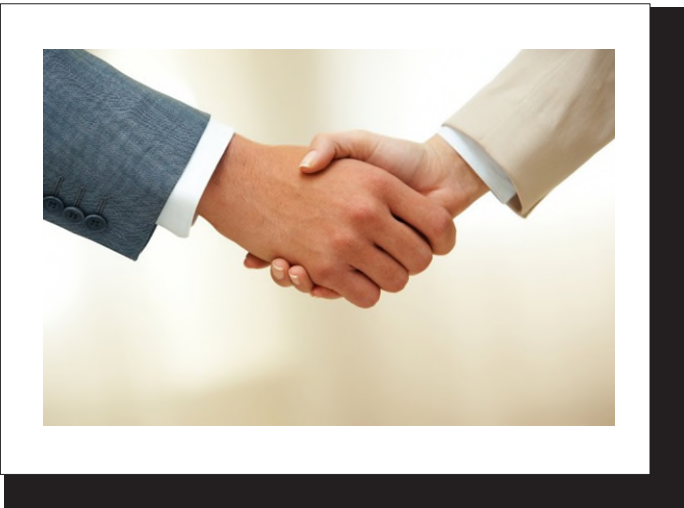
Bucks County
Facts and Figures

- 15 school districts
- Three Charter Schools
- 11 Cyber Charter Schools
- Three CTC's
- One IU
- 39 Non-Public Schools

Maureen Linahan, Title IX and Section 504 coordinator, at 484-237-5086/DeafRelay@cciu.org; or in writing at the Chester County Intermediate Unit, 455 Boot Road, Downingtown, PA 19335.



Chester County Intermediate Unit
455 Boot Road
Downingtown, PA 19335
(484) 237-5000
www.cciu.org



Chester County Intermediate Unit

The Chester County Intermediate Unit will not discriminate in employment, educational programs or activities based on race, color, religion, national origin, age, sex, disability, marital status or because a person is a disabled veteran or a veteran of the Vietnam era. Reasonable accommodations will be provided for employees and program participants who are disabled. For information regarding civil rights or grievance procedures, contact



The
Pennsbury School District
Board of Directors
Communication Protocols



March
2018

School Governance

School Governance

Constitution of Pennsylvania
Article III, Section 14
“The General Assembly shall provide for the maintenance and support of a thorough and efficient system of public education to meet the needs of the Commonwealth.”

- State Board of Education**
- Council of Basic Education
 - Council of Higher Education
 - Regulations found in 22 Pa. Code

- Local School Boards of Education**
- Elected in 498 school districts
 - Authorized to (see Article V of Pa. School Code):
 - adopt policies
 - approve budgets, levy taxes
 - build & operate schools
 - hire Superintendent and other employees
 - adopt and enforce reasonable rules and regulations
 - Superintendent shall have a seat on the board and the right to speak on all matters before the board, but not to vote (see 24 P.S. 10-1081).

Issues	Board Solutions
2. Requests for information from: <i>Attorneys & consultants...</i> <i>Always a charge</i>	<ul style="list-style-type: none">• Personal need vs. request for action needs full board awareness.• Board members should call Superintendent to discuss; Superintendent will send explanation to Board President and Board.• Superintendent should initiate call unless it’s a personnel question re: Superintendent.
4. Responding to information that appears to be inaccurate	<ul style="list-style-type: none">• Do not embarrass presenter.• Talk with Superintendent in advance if possible.
6. Updates to Board Shared Site	<ul style="list-style-type: none">• If Board agenda goes out Friday, info is due Wednesday at noon – eight days beforehand.• Anything past this time, copy of update in email and a phone call or text referring to updates.• Send all comments on agenda items to Superintendent by Tuesday at noon.
8. No last minute additions to Board agenda – unless an emergency	<ul style="list-style-type: none">• No surprises – these make everyone look bad. (Think of bad legislators adding self-serving amendments to bills at last minute.)
10. Constituent Emails	<ul style="list-style-type: none">• Friendly, gracious, and non-promising response is best.• Be careful—anyone can cut & paste your response.



Communication Concepts to Keep in Mind

Remember Always:

- Why are they telling me this?
- What do they want me to do with this information?
- “Just making you aware” is seldom what they want.

You Should:

1. Explain the Board system – most do not understand:
 - You are one of ten (nine).
 - Superintendent and administrators run district: you hire and hold them accountable.
2. Listen graciously and sympathetically.
 - Many people just want to be heard.
3. Always ask: “How can I help? What would you like me to do?”
4. Ask the person to send you and the Superintendent an e-mail – so that follow up is assured.
5. Insist that your Superintendent follows through and copies you on the response:
 - Dave needs to establish this process of responding to community complaints.
 - An informal log should be maintained for Board/Superintendent annual review – “frequent users” start to emerge.
 - Develop strategies aimed at helping frequent users/complainers. Develop strategies for topic specific complaints – eg. New math program; schedule; athletic program...
6. Be aware you will be quoted and referenced throughout the community – and nothing is “off the record” (unless you are speaking to a professional journalist!).



CHESTER COUNTY INTERMEDIATE UNIT

Educational Service Center, 455 Boot Road, Downingtown, PA 19335

Joseph J. O'Brien, Ed.D.
Executive Director

JoeO@cciu.org
484.237.5010

December 30, 2017

A Proposal for the Pennsbury School District Board For Executive Coaching for the Superintendent and Top Management Team

I. Executive Summary

Unlike national and for-profit executive search companies, as a Pennsylvania K-12 public regional educational service organization, the CCIU has a vested interest in public education.

As one of 29 public, regional educational service agencies created by the Pennsylvania General Assembly in 1971, the Chester County Intermediate Unit (CCIU) is uniquely qualified to assist the public school districts of the Commonwealth of Pennsylvania.

As an integral member of the Pennsylvania Public School System and as a member of a statewide network of intermediate units, CCIU staff is aware of the challenges facing our public schools and the skills, qualities and leadership traits necessary to lead our schools in the 21st century. As a part of a statewide network, we are aware of the demographic, social and economic diversity of our great state and the unique characteristics and challenges of each of our school districts.

Our team is comprised of Pennsylvania career educators and leaders in their fields who are able to skillfully analyze educational leadership situations and prescribe some effective remedies to improve both Board – Superintendent and Superintendent – Administrative Team communications, interactions, and decision making systems.

To date, the CCIU has successfully conducted superintendent and top administrative staffing development coaching and training for over a dozen school districts, including but not limited to: Avon Grove, Collegium Charter School, Downingtown Area, Great Valley, Haverford Township, Owen J. Roberts, Oxford Area, Radnor Township, Rose Tree Media and Unionville-Chadds Ford. While the nature of our actions are always kept confidential and discreet, we have successfully improved the communication protocols and working relationships within each of the school districts we have assisted with leadership issues in their top management teams.

The Chester County Intermediate Unit's Team prides itself on providing comprehensive leadership services tailored to the needs of each school district. The following proposal outlines our services. If you have any questions regarding the proposal, please contact Dr. Joseph O'Brien at 484-237-5010.

II. Scope of Work

This is a written proposal wherein Chester County Intermediate Unit (CCIU) would provide coaching and mentoring for Superintendent William Gretzula – to be followed up with advice, communications systems, and logistical support to School Board (the Board) in their attempt to improve internal and external communications, resolve and prevent employee and administrative concerns, develop improved systems for decision making and charting progress within the administrative team. The CCIU will develop an improvement plan for the Superintendent, with specific, measurable goals that can be evaluated by the Board.

CCIU will provide the following:

1. Private sessions with the Superintendent to fully discuss leadership challenges and to encourage clear decision making, with suggestions for immediate improvement;
2. Private sessions with individual members of the Superintendent's Cabinet and principals to fully discuss communication issues with the Superintendent;
3. Private sessions with the Board to provide an assessment of the Superintendent's performance and to gather the Board's input and ideas;
4. Developing a detailed analysis of the pertinent issues, and an improvement plan for the Superintendent to address those issues;
5. The consultant will conduct a "targeted confidential" executive briefing with the Superintendent and all required administrative leaders;
6. Confidential compilation of all information provided;
7. A Board level briefing on the analysis and the improvement plan for the Superintendent so developed, to include benchmarks for improvement by the Superintendent;
8. Making all logistical arrangements with the interviewees;
9. Provide feedback and assessment of the Superintendent's progress on the improvement plan to the Board on a monthly basis through the end of 2018.

III. Cost of Services

Unlike for-profit search firms, the proceeds from a CCIU executive search go back to funding programs for Pennsylvania public school students by defraying the administrative costs and overhead of the CCIU. In other words, CCIU reinvests the proceeds from its executive assistance programs back into Pennsylvania's public schools.

Although, every district's situation is unique and therefore the time needed to conduct each analysis varies by district, it is estimated that our analysis for the Pennsbury School District will not exceed \$8,000. **This fee will be charged at an hourly rate, and monthly reports can be issued for the Board to monitor.** Variables affecting the cost include: travel expenses, number of meetings requested by Board and the Board's decision-making process and extra requirements.

Fee Rates: \$125/hr for search team leader - Joseph J. O'Brien, Ed.D. Dr. O'Brien will do the bulk of the work personally.
 \$75/hr for any other administrative personnel used – **However, no other staff are expected to be needed**
 \$35/hr for clerical support – **this should be minimal.**

In addition to the fee rates for personnel, the actual costs for the consultant's travel expenses will be included as needed: food; and other related business and travel expenses will be billed to the district at cost.

CCIU will furnish Pennsbury School District with an itemized invoice for expenses related to the work. Payment is due 30 days upon completion of search services.

IV. Experience and Qualifications

i. Overview of Company

The Chester County Intermediate Unit (CCIU) provides services to the 12 school districts in Chester County. This includes services to nearly 86,000 public and non-public school students and over 6,000 educators. CCIU's major services include: special education and compensatory education programs; career, technical and customized education; mentor training and staff development; technology initiatives; consortia for school business operations; and curriculum services.

CCIU is one of 29 regional educational agencies established by law in Pennsylvania in 1971. Working between the Pennsylvania State Department of Education and the local school districts, the intermediate unit's mission is to provide services that can be offered most economically at the regional level.

CCIU headquarters are located at 455 Boot Road, Downingtown, Pennsylvania. In addition, the CCIU operates five schools in Chester County, Pennsylvania, and operates virtual academies for more than 40 school districts in southeastern Pennsylvania.

The CCIU conducts superintendent searches and provides administrative and technical staffing and consultative services in the areas of business office operations, curriculum services, maintenance and custodial services, special education services and technology services. Last but not least, the CCIU executive team provides school board in-service programs and retreats and executive coaching.

Unlike national and for-profit search organizations, as a Pennsylvania K-12 public regional educational service organization, the CCIU has a vested interest in placing the best candidate, not just a candidate, in each and every district for which it conducts a search. Working as a network of educational service agencies, it is the mission of intermediate units to ensure that all Pennsylvania students receive an education that ensures all the commonwealth's students reach their full potential. We understand that a great educational system begins with great leadership, and we will not be satisfied unless we know that our clients have the best skilled, most suited superintendent for their district.

ii. Project Team

The CCIU Executive Coaching Team was formed in 2008 to conduct Board and Superintendent training for our regional school districts. Led by Dr. Joseph O'Brien, CCIU executive director, the CCIU has successfully conducted superintendent and top administrative staffing development coaching and training for over a dozen school districts, including but not limited to: Avon Grove, Collegium Charter School, Downingtown Area, Great Valley, Haverford Township, Owen J. Roberts, Oxford Area, Radnor Township, Rose Tree Media and Unionville-Chadds Ford. While the nature of our actions are always kept

confidential and discreet, we have successfully improved the communication protocols and working relationships within each of the school districts we have assisted with leadership issues in their top management teams.

Our team is made up of Pennsylvania career educators and leaders in their fields. For this work, it is expected that only the following team members would be involved:

- **Dr. Joseph O'Brien, executive director**

Contact Information:

JoeO@cciu.org | 484-237-5010 (work); 484-459-9913 (cell); 610-566-1144 (home)

Dr. Joseph J. O'Brien is the executive director of the Chester County Intermediate Unit. He was appointed executive director in April 2007 and continues to serve with distinction and to provide leadership as the educational agency's top executive. In addition to his duties as CCIU's executive director, Dr. O'Brien is the past president of the Pennsylvania Association of Intermediate Units, and has held the office of treasurer, secretary, and vice president for the statewide organization.

Prior to his appointment as CCIU's executive director, Dr. O'Brien served as a superintendent of schools for eight years. He was superintendent of Haddonfield School District in New Jersey from 2005-2007, and of the Springfield School District in Delaware County, Pennsylvania from 1999 until 2005. In addition, Dr. O'Brien served as a high school principal and assistant principal and a classroom teacher in the Springfield School District, Delaware County.

In addition to his work at the CCIU, Dr. O'Brien has conducted numerous superintendent searches. His most recent were for the Avon Grove, Chester Upland, Downingtown Area, Garnet Valley, Great Valley, Haddonfield (New Jersey), Haverford Township, Midd-West, Owen J. Roberts, Oxford Area, Peters Township, Phoenixville Area, Radnor Township, Rose Tree Media and Unionville-Chadds Ford School Districts. To date, 95% of the matches we have made between Superintendents and their respective communities are still intact.

- **Ms. Mary Jeanne Curley, director of communications and learning solutions**

Contact Information: MaryC@cciu.org | 484-237-5171

Ms. Mary Jeanne Curley, director of communications and learning solutions, has been employed by the Chester County Intermediate Unit since 1986. Ms. Curley is an original member of the search committee that was formed in 2008. She has led two searches and assisted in over a dozen superintendent searches by screening and rating applicants, developing applicant screening rubrics, conducting focus groups, analyzing focus group feedback, hosting community forums to meet the candidate, developing candidate profiles, serving as a media liaison, interviewing candidates and overseeing internal and external search communications. As the director of communications and learning solutions, Ms. Curley oversees the division, which includes all communications and legislative related functions of the CCIU. She also oversees the student support and customer service operations of the Brandywine Virtual Academy, which operates virtual academies in 30 school districts in Bucks, Chester, Delaware and Montgomery Counties. In 2008, while employed as the director of public relations, Ms. Curley augmented her education, earning a Master's degree in Communication Studies from West Chester University. Ms. Curley has also served as Public Relations Committee Chair on the Pennsylvania Association of Intermediate Units, and as such she meets with her counterparts from

throughout the state and is able to get a firm understanding of the issues and challenges facing school districts throughout the commonwealth. Currently, she is a member of the Pennsylvania School Public Relations Association and the National School Public Relations Association.
superintendent search.

- **Ms. Janice Heagy, administrative assistant**

Contact Information: JaniceH@cciu.org | 484-237-5010

Ms. Janice Heagy has been an integral member of the search team since 2008. As the administrative assistant to the executive director, Ms. Heagy serves as a point of contact for school district personnel, board members and candidates. She is instrumental in maintaining the search intranet site, scheduling interviews and focus groups and assisting with logistics. Ms. Heagy has served as an executive administrative assistant for over 20 years at CCIU.

V. **Timeline**

This work should be started and completed as quickly as possible – necessitating an intensive amount of time to begin the process. The total time is estimated to be about 40 hours – depending upon the availability of the key members of the administrative team and the Superintendent.

The consultant has out of the state obligations beginning the end of January and running for about three weeks, so it is recommended to begin as early as possible this January – with an end date of the end of February for final completion of the assessment and preparation of the report.

The final report should be shared with the Board and Superintendent in early March.

VI. **Contract**

The one page contract is included as the next page of this proposal.... Page six (6).

Respectfully submitted for Pennsbury Board of School Directors,

Joe O'Brien

Joseph J. O'Brien, Ed.D.
Executive Director

Chester County Intermediate Unit

CONTRACT AGREEMENT

This agreement is between the:

CHESTER COUNTY INTERMEDIATE UNIT ("CCIU")

and the

PENNSBURY SCHOOL DISTRICT ("DISTRICT")

The term of this Agreement shall be _____ to _____.

During the terms of this agreement, the CCIU shall provide for the District and the District shall purchase from the CCIU services listed below and fully described in the attached appendices, pursuant to terms set forth therein.

Superintendent and Administrative Team Coaching and Development – Full-Service Executive Coaching Services as per the following terms:

- ***Fee Rates:***
 - ☐ *\$125/hr. for search lead*
 - ☐ *\$75/hr. for all administrative personnel*
 - ☐ *\$35/hr. for clerical support*
 - ☐ *Actual costs for mileage, food; and other related business and travel expenses*
- *CCIU will furnish the Pennsbury School District an itemized invoice for all expenses related to the leadership analysis report and the Communications and decision making coaching .*
- *Payment due 30 days upon completion of search services.*

The District agrees to pay CCIU for services to be rendered as outlined and defined within this proposal.

CCIU will issue invoices to the District at the completion of the search. Payment is due within 30 days of receipt of invoice.

In witness whereof, the parties hereto intending to be legally bound have executed this Agreement for the term indicated.

**Accepted by the Pennsbury
School District Board**

Accepted by Chester County Intermediate Unit

Signature

Date

Signature

Date

Title: _____

Title: Executive Director

